

- Social security cards or ITIN letters for all persons on your tax return.
- Picture ID (such as valid driver's license) for you and your spouse.

5. Your Date of Birth	6. Your job title	7. Last year, were you:	a. Full time student	<input type="checkbox"/> Yes	<input type="checkbox"/> No
		b. Totally and permanently disabled	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> c. Legally blind
8. Your spouse's Date of Birth	9. Your spouse's job title	10. Last year, was your spouse:	a. Full time student	<input type="checkbox"/> Yes	<input type="checkbox"/> No
		b. Totally and permanently disabled	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> c. Legally blind
11. Can anyone claim you or your spouse on their tax return?		<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure	
12. Have you or your spouse:		a. Been a victim of identity theft?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	b. Adopted a child? <input type="checkbox"/> Yes <input type="checkbox"/> No

1. As of December 31 of last year, were you:

<input type="checkbox"/> Single	Did you live with your spouse during any part of the last six months of 2013?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Married	Divorced or Legally Separated	Date of final decree or separate maintenance agreement		
<input type="checkbox"/> Divorced	Widowed	Year of spouse's death		

- anyone you supported but did not live with you last year

To report unethical behavior to the IRS, email us at wi.voltax@irs.gov or call toll free 1-877-330-1205.

Yes	No	Unsure	Check appropriate box for each question in each section
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Part III – Income – Last Year, Did You (or Your Spouse) Receive

Yes	No	Unsure	Question
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. (B) Wages or Salary? (Form W-2) If yes, how many jobs did you have last year? _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. (A) Tip Income?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. (B) Scholarships? (Forms W-2, 1098-T)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. (B) Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. (B) Refund of state/local income taxes? (Form 1099-G)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. (B) Alimony income?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. (A) Self-Employment income? (Form 1099-MISC, cash)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. (A) Cash/check payments for any work performed not reported on Forms W-2 or 1099?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. (A) Income (or loss) from the sale of Stocks, Bonds or Real Estate? (including your home) (Forms 1099-S, 1099-B)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10. (B) Disability income? (such as payments from insurance, or workers compensation) (Forms 1099-R, W-2)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11. (A) Distribution from Pensions, Annuities, and/or IRA? (Form 1099-R)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12. (B) Unemployment compensation? (Form 1099-G)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13. (B) Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14. (M) Income (or loss) from Rental Property?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15. (B) Other income? (gambling, lottery, prizes, awards, jury duty, Sch K-1, etc.) (Forms W-2G) Specify _____

Part IV – Expenses – Last Year, Did You (or Your Spouse) Pay

Yes	No	Unsure	Question
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. (B) Alimony? If yes, do you have the recipient's SSN? <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Contributions to a retirement account? _____ IRA (A) _____ Roth IRA (B) _____ 401K (B) _____ Other
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. (B) Post secondary educational expenses for yourself, spouse or dependents? (Form 1098-T)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. (B) Unreimbursed employee business expenses? (such as uniforms or mileage)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. (B) Medical expenses? (including health insurance premiums)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. (B) Home mortgage interest? (Form 1098)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. (B) Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. (B) Charitable contributions?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. (B) Child or dependent care expenses such as daycare?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10. (B) For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11. (A) Expenses related to self-employment income or any other income you received?

Part V – Life Events – Last Year, Did You (or Your Spouse)

Yes	No	Unsure	Question
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. (HSA) Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. (COD) Have debt from a mortgage or credit card cancelled/forgiven by a commercial lender? (Forms 1099-C, 1099-A)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. (A) Buy, sell or have a foreclosure (COD) of your home? (Form 1099-A)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. (B) Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year? _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. (A) Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. (B) Live in an area that was affected by a natural disaster? If yes, where? _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. (A) Receive the First Time Homebuyers Credit in 2008?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. (B) Pay any student loan interest? (Form 1098-E)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. (B) Make estimated tax payments or apply last year's refund to this year's tax? If so how much? _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10. (A) File a federal return last year containing a "capital loss carryover" on Form 1040 Schedule D?

Part VI – Additional Information and Questions Related to the Preparation of Your Return**Presidential Election Campaign Fund** (If you check a box, your tax or refund will not change)Check here if you, or your spouse if filing jointly, want \$3 to go to this fund ☐ You ☐ Spouse**If you are due a refund, would you like**

Direct deposit	To purchase U.S. Savings Bonds	To split your refund between different accounts
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

If you have a balance due, would you like to make a payment directly from your bank account? ☐ Yes ☐ No

Many free tax preparation sites operate by receiving grant money. The data from the following questions may be used by this site to apply for these grants. Your answers will be used only for statistical purposes.

Other than English, what language is spoken in your home? _____ ☐ Prefer not to answerAre you or a member of your household considered disabled? ☐ Yes ☐ No ☐ Prefer not to answer

IRS Certified Volunteer Preparers participating in the VITA and TCE programs must use a correct Intake/Interview process to prepare each return.

Before preparing the tax return:

- Interview the taxpayer using probing questions to clarify information on this form and confirm the information provided by the taxpayer is complete and accurate.
- Correct any incomplete or inaccurate information on this form including all "Unsure" answers.
- Review all supporting documentation provided by the taxpayer. (*Forms W-2, 1099, payment receipts, etc.*)
- Use Publication 4012, Volunteer Resource Guide and Publication 17, Your Federal Income Tax to validate tax law determinations.

VITA/TCE Preparers Due Diligence Requirements

- All IRS certified volunteers must exercise due diligence. This means, as a volunteer, you must do your part when preparing or quality reviewing a tax return to ensure the information on the return is correct and complete.
- Doing your part includes: confirming a taxpayer's (*and spouse if applicable*) identity and providing top-quality service by helping them understand and meet their tax responsibilities.
- Generally, as an IRS certified volunteer, you can rely in good faith on information from a taxpayer. However, part of due diligence requires asking a taxpayer to clarify information that may appear to be inconsistent or incomplete. When reviewing information for its accuracy, you need to ask yourself if the information is unusual or questionable.

Make an effort to find the answer

When in doubt:

- Seek Assistance from the site coordinator or a certified volunteer preparer with more experience.
- Research publications (*i.e. Publication 17, Publication 4012, Publication 596, etc.*).
- Research www.irs.gov for your answer.
- Research the Interactive Tax Assistance (ITA) tool to address tax law qualifications.
- Contact the VITA Hotline (*see Publication 4012*).
- Advise taxpayers to seek assistance from a professional return preparer if you cannot address their tax law issue.

If at any time you are uncomfortable with the information and/or documentation provided by a taxpayer, you should not prepare the tax return.

Part VII – IRS Certified Volunteer Quality Reviewer Section

Review the tax return with the taxpayer to promote accuracy.

1. Taxpayer (and Spouse's) Identity verified with a photo ID.
2. The volunteer return preparer/ quality reviewer are **certified** to prepare/review this return.
3. All **unsure** boxes were discussed with the taxpayer and correctly marked yes or no.
4. The **information** on pages one and two was correctly addressed and transferred to the return.
5. Names, **SSNs**, **ITINs**, and **EINs**, were verified and correctly transferred to the return.
6. **Filing status** was verified and correct.
7. **Personal and Dependency Exemptions** are entered correctly on the return.
8. All **Income** (*including income with or without source documents*) checked "yes" in part III was correctly transferred to the tax return.
9. **Adjustments** are correct.
10. **Standard, Additional or Itemized Deductions** are correct.
11. All **credits** are correctly reported.
12. **Withholding** shown on Forms W-2, 1099 and **Estimated Tax Payments** are correctly reported.
13. **Direct Deposit/Debit** and checking/saving account numbers are correct.
14. **SIDN** is correct on the return.
15. The taxpayer(s) was advised that they are **responsible** for the information on their return.

Certified Volunteer Preparer's name/initials (*optional*)

Certified Volunteer Quality Reviewer's name/initials (*optional*)